

## WHAT IS CLAIMED IS:

1. A method for defining a process map for processing a financial service organization business product transaction, the method comprising:

displaying a plurality of task objects on a computer display screen;

displaying a process map design palette on the computer display screen;

selecting a first task object from the displayed plurality of task objects;

adding the first task object to the process map design palette; and

storing the process map in a business model database;

wherein the process map stored in the business model database is configured for translation into a financial service organization production system database, wherein the financial service organization production system database is configured for use in the financial service organization production system, and wherein the financial service organization production system is configured to process business product transactions between a financial service organization and a financial service organization customer.

2. The method of claim 1, wherein selecting the first task object comprises moving a cursor over the first task object.

3. The method of claim 2, wherein adding the first task object to the process map design palette comprises moving the selected first task object onto the process map design palette.

4. The method of claim 1, further comprising:

selecting a second task object from the displayed plurality of task objects;

and

adding the second task object to the process map design palette.

5. The method of claim 4, wherein the method further comprises defining a processing path between the first task object and the second task object, wherein the processing path describes a path for business product transactions to be passed from the first processing task to the second processing task in the financial service organization production system.

6. The method of claim 5, wherein the first task object comprises one or more output links, and wherein defining the processing path between the first task object and the second task object comprises connecting a first output link of the first task object to the second task object.

7. The method of claim 5, further comprising:

selecting a third task object from the displayed plurality of task objects;

adding the third task object to the process map design palette; and

defining a processing path between the first task object and the third task object;

wherein the first task object is a decision task object configured to pass a business product transaction to one of the first and second task objects as a function of data relating to the financial service organization customer associated with the business product transaction.

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8. The method of claim 1, wherein the first task is an invoke external interface task.

9. The method of claim 6, further comprising:

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selecting a third task object from the displayed plurality of task objects;

adding the third task object to the process map design palette; and

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defining a processing path between the first task object and the third task object;

wherein defining the processing path between the first task object and the third task object comprises disconnecting the first output link of the first task object from the second task object and connecting the first output link of the first task object to the third task object.

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10. A system for processing FSO transactions, the system comprising:

a computer program;

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a computer system;

wherein the computer program is executable on the computer system to execute the method of:

displaying a plurality of task objects on a computer display screen;

displaying a process map design palette on the computer display screen;

selecting a first task object from the displayed plurality of task objects;

5 adding the first task object to the process map design palette; and

storing the process map in a business model database;

10 wherein the process map stored in the business model database is configured for translation into a financial service organization production system database, wherein the financial service organization production system database is configured for use in the financial service organization production system, and wherein the financial service organization production system is configured to process business product transactions between a financial service organization and a financial service organization customer.

15 11. The system of claim 10, wherein selecting the first task object comprises moving a cursor over the first task object.

20 12. The system of claim 11, wherein adding the first task object to the process map design palette comprises moving the selected first task object onto the process map design palette.

25 13. The system of claim 10, further comprising:  
selecting a second task object from the displayed plurality of task objects;  
and  
adding the second task object to the process map design palette.

14. The system of claim 13, wherein the method further comprises defining a processing path between the first task object and the second task object, wherein the processing path describes a path for business product transactions to be passed from the first processing task to the second processing task in the financial service organization production system.

15. The system of claim 14, wherein the first task object comprises one or more output links, and wherein defining the processing path between the first task object and the second task object comprises connecting a first output link of the first task object to the second task object.

16. The system of claim 14, further comprising:  
selecting a third task object from the displayed plurality of task objects;  
adding the third task object to the process map design palette; and  
defining a processing path between the first task object and the third task object;

wherein the first task object is a decision task object configured to pass a business product transaction to one of the first and second tasks objects as a function of data relating to the financial service organization customer associated with the business product transaction.

17. The system of claim 10, wherein the first task is an invoke external interface task.

18. The system of claim 15, further comprising:

selecting a third task object from the displayed plurality of task objects;

adding the third task object to the process map design palette; and

defining a processing path between the first task object and the third task object;

5 wherein defining the processing path between the first task object and the third task object comprises disconnecting the first output link of the first task object from the second task object and connecting the first output link of the first task object to the third task object.

10 19. The system of claim 10, wherein the computer system comprises a display device coupled to the computer system to display data.

20. The system of claim 19, wherein the display device is a display screen.

21. The system of claim 10, wherein the computer system comprises a user input device coupled to the computer system to enter data.

15 22. The system of claim 21, wherein the user input device is a mouse or a keyboard.

23. A carrier medium comprising program instructions, wherein the program instructions are executable by a computer system to implement the method of:

20 displaying a plurality of task objects on a computer display screen;

displaying a process map design palette on the computer display screen;

selecting a first task object from the displayed plurality of task objects;

25 adding the first task object to the process map design palette; and

storing the process map in a business model database;

wherein the process map stored in the business model database is configured for translation into a financial service organization production system database, wherein the financial service organization production system database is configured for use in the financial service organization production system, and wherein the financial service organization production system is configured to process business product transactions between a financial service organization and a financial service organization customer.

24. The carrier medium of claim 23, wherein selecting the first task object comprises moving a cursor over the first task object.

25. The carrier medium of claim 24, wherein adding the first task object to the process map design palette comprises moving the selected first task object onto the process map design palette.

26. The carrier medium of claim 23, further comprising:

selecting a second task object from the displayed plurality of task objects;

and

adding the second task object to the process map design palette.

27. The carrier medium of claim 26, wherein the method further comprises defining a processing path between the first task object and the second task object, wherein the processing path describes a path for business product transactions to be passed from the first processing task to the second processing task in the financial service organization production system.

28. The carrier medium of claim 27, wherein the first task object comprises one or more output links, and wherein defining the processing path between the first task object and the second task object comprises connecting a first output link of the first task object to the second task object.

29. The carrier medium of claim 27, further comprising:

selecting a third task object from the displayed plurality of task objects;

adding the third task object to the process map design palette; and

defining a processing path between the first task object and the third task object;

wherein the first task object is a decision task object configured to pass a business product transaction to one of the first and second tasks objects as a function of data relating to the financial service organization customer associated with the business product transaction.

30. The carrier medium of claim 23, wherein the first task is an invoke external interface task.

31. The carrier medium of claim 28, further comprising:

selecting a third task object from the displayed plurality of task objects;

adding the third task object to the process map design palette; and



defining a processing path between the first task object and the third task object;

wherein defining the processing path between the first task object and the third task object comprises disconnecting the first output link of the first task object from the second task object and connecting the first output link of the first task object to the third task object.

32. The carrier medium of claim 23, wherein the carrier medium is a memory medium.

33. A method for graphically programming a financial service organization production system, the method comprising:

displaying a plurality of task objects on a graphical user interface;

displaying a process map design palette on the graphical user interface;

selecting a first task object from the displayed plurality of task objects;

adding the first task object to the process map design palette; and

storing the process map in a business model database;

wherein the financial service organization production system is configured to process business product transactions between a financial service organization and a financial service organization customer.

34. A system for processing FSO transactions, the system comprising:

a computer program;  
a computer system;  
wherein the computer program is executable on the computer system to  
execute the method of:

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displaying a plurality of task objects on a graphical user interface;  
  
displaying a process map design palette on the graphical user interface;  
  
10 selecting a first task object from the displayed plurality of task objects;  
  
adding the first task object to the process map design palette; and  
  
storing the process map in a business model database;

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wherein the financial service organization production system is configured to  
process business product transactions between a financial service organization  
and a financial service organization customer.

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35. The system of claim 34, wherein the computer system comprises a display  
device coupled to the computer system to display data.

36. The system of claim 35, wherein the display device is a display screen.

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37. The system of claim 34, wherein the computer system comprises a user  
input device coupled to the computer system to enter data.

38. The system of claim 35, wherein the user input device is a mouse or a  
keyboard.

39. A carrier medium comprising program instructions, wherein the program instructions are executable by a computer system to implement the method of:

5 displaying a plurality of task objects on a graphical user interface;

displaying a process map design palette on the graphical user interface;

10 selecting a first task object from the displayed plurality of task objects;

adding the first task object to the process map design palette; and

storing the process map in a business model database;

15 wherein the financial service organization production system is configured to process business product transactions between a financial service organization and a financial service organization customer.

40. The carrier medium of claim 39, wherein the carrier medium is a memory medium.

20 41. A carrier medium comprising program instructions for defining a process map for processing a financial service organization business product transaction, wherein the program instructions are executable by a computer system to  
25 implement a method of:

displaying a plurality of task objects on a computer display screen;

displaying a process map design palette on the computer display screen;

selecting a first task object from the displayed plurality of task objects;

adding the first task object to the process map design palette; and

storing the process map in a business model database;

wherein the process map stored in the business model database is configured for translation into a financial service organization production system database, wherein the financial service organization production system database is configured for use in the financial service organization production system, and wherein the financial service organization production system is configured to process business product transactions between a financial service organization and a financial service organization customer.

42. The carrier medium of claim 41, wherein the carrier medium is a memory medium.

43. A carrier medium comprising program instructions for graphically programming a financial service organization production system, wherein the program instructions are executable by a computer system to implement a method of:

displaying a plurality of task objects on a graphical user interface;

displaying a process map design palette on the graphical user interface;

selecting a first task object from the displayed plurality of task objects;

adding the first task object to the process map design palette; and

storing the process map in a business model database;

5 wherein the financial service organization production system is configured to process business product transactions between a financial service organization and a financial service organization customer.

10 44. The carrier medium of claim 43, wherein the carrier medium is a memory medium.

45. A method performed in a financial services organization (FSO) computer system, the method comprising:

15 displaying one or more processing step objects, wherein each of the one or more processing step objects has a corresponding representation for display on a display screen in data communication with the FSO computer system comprising a database;

20 selecting a first representation of a first processing step object;  
transferring the first representation to a process workflow diagram object represented as a workflow display on the display screen, wherein the process workflow diagram object describes a process workflow step sequence;  
defining one or more properties of the first processing step object;  
storing the process flow diagram object in the database.

25 46. The method of claim 45 further comprising:  
selecting a second representation of a second processing step object;  
transferring the second representation to the process workflow diagram object represented as the workflow display on the display screen;

connecting the first representation to the second representation to indicate a direction of the process workflow.

47. The method of claim 45, wherein transferring the first representation to the process workflow diagram object comprises dragging the first representation and dropping the first representation onto the process workflow diagram object.

48. The method of claim 45, wherein the definition of one or more properties of the first processing step object is modifiable during runtime of the FSO computer system.

49. The method of claim 45, wherein the definition of one or more properties of the first processing step object is modifiable during configuration of the FSO computer system.

50. The method of claim 45, wherein the FSO computer system comprises an object-oriented programming tool to prepare the process workflow diagram object or the first processing step object.

51. The method of claim 45, wherein the database is object-oriented.

52. The method of claim 45, wherein the workflow display comprises a blank portion of the display screen, wherein transferring the first representation comprises adding the first representation to the blank portion of the display screen.

53. The method of claim 45, wherein the first representation and the second representation are icons on the display screen.

54. The method of claim 46, wherein the first processing step object comprises one or more output links, wherein the second processing step object comprises one or more input links, and wherein connecting the first representation to the second representation comprises linking a first output link of the first processing step object to a first input link of the second processing step object.

55. The method of claim 46, wherein the direction of the process workflow is indicated by an arrow.

56. A system for processing FSO transactions, the system comprising:  
a computer program;  
a computer system;  
wherein the computer program is executable on the computer system to execute the method of:

displaying one or more processing step objects, wherein each of the one or more processing step objects has a corresponding representation for display on a display screen in data communication with the FSO computer system comprising a database;

selecting a first representation of a first processing step object;  
transferring the first representation to a process workflow diagram object represented as a workflow display on the display screen, wherein the process workflow diagram object describes a process workflow step sequence;  
defining one or more properties of the first processing step object;  
storing the process flow diagram object in the database.

57. The system of claim 56 further comprising:  
selecting a second representation of a second processing step object;  
transferring the second representation to the process workflow diagram object represented as the workflow display on the display screen;

connecting the first representation to the second representation to indicate a direction of the process workflow.

5 58. The system of claim 56, wherein transferring the first representation to the process workflow diagram object comprises dragging the first representation and dropping the first representation onto the process workflow diagram object.

10 59. The system of claim 56, wherein the definition of one or more properties of the first processing step object is modifiable during runtime of the FSO computer system.

60. The system of claim 56, wherein the definition of one or more properties of the first processing step object is modifiable during configuration of the FSO computer system.

15 61. The system of claim 56, wherein the FSO computer system comprises an object-oriented programming tool to prepare the process workflow diagram object or the first processing step object.

20 62. The system of claim 56, wherein the database is object-oriented.

25 63. The system of claim 56, wherein the workflow display comprises a blank portion of the display screen, wherein transferring the first representation comprises adding the first representation to the blank portion of the display screen.

64. The system of claim 56, wherein the first representation and the second representation are icons on the display screen.



65. The system of claim 57, wherein the first processing step object comprises one or more output links, wherein the second processing step object comprises one or more input links, and wherein connecting the first representation to the second representation comprises linking a first output link of the first processing step object to a first input link of the second processing step object.

66. The system of claim 57, wherein the direction of the process workflow is indicated by an arrow.

67. The system of claim 56, wherein the computer system comprises a display device coupled to the computer system to display data.

68. The system of claim 67, wherein the display device is a display screen.

69. The system of claim 56, wherein the computer system comprises a user input device coupled to the computer system to enter data.

70. The system of claim 69, wherein the user input device is a mouse or a keyboard.

71. A carrier medium comprising program instructions, wherein the program instructions are executable by a computer system to implement the method of:

displaying one or more processing step objects, wherein each of the one or more processing step objects has a corresponding representation for display on a display screen in data communication with the FSO computer system comprising a database;

selecting a first representation of a first processing step object;

transferring the first representation to a process workflow diagram object represented as a workflow display on the display screen, wherein the process workflow diagram object describes a process workflow step sequence;

defining one or more properties of the first processing step object;

5 storing the process flow diagram object in the database.

72. The carrier medium of claim 71 further comprising:

selecting a second representation of a second processing step object;

10 transferring the second representation to the process workflow diagram object represented as the workflow display on the display screen;

connecting the first representation to the second representation to indicate a direction of the process workflow.

73. The carrier medium of claim 71, wherein transferring the first representation to the process workflow diagram object comprises dragging the first representation and dropping the first representation onto the process workflow diagram object.

74. The carrier medium of claim 71, wherein the definition of one or more properties of the first processing step object is modifiable during runtime of the FSO computer system.

75. The carrier medium of claim 71, wherein the definition of one or more properties of the first processing step object is modifiable during configuration of the FSO computer system.

76. The carrier medium of claim 71, wherein the FSO computer system comprises an object-oriented programming tool to prepare the process workflow diagram object or the first processing step object.

77. The carrier medium of claim 71, wherein the database is object-oriented.

78. The carrier medium of claim 71, wherein the workflow display comprises a blank portion of the display screen, wherein transferring the first representation comprises adding the first representation to the blank portion of the display screen.

79. The carrier medium of claim 71, wherein the first representation and the second representation are icons on the display screen.

80. The carrier medium of claim 72, wherein the first processing step object comprises one or more output links, wherein the second processing step object comprises one or more input links, and wherein connecting the first representation to the second representation comprises linking a first output link of the first processing step object to a first input link of the second processing step object.

81. The carrier medium of claim 72, wherein the direction of the process workflow is indicated by an arrow.

82. The carrier medium of claim 71, wherein the carrier medium is a memory medium.

83. A method performed in a financial services organization (FSO) computer system, the method comprising:

listing one or more processing steps on a display screen in data communication with the FSO computer system comprising a database;  
selecting a first step from the listed one or more processing steps;

preparing a process flow diagram comprising the selected first step,  
wherein the process flow diagram is displayed on the display screen, wherein the  
process workflow diagram describes a process workflow sequence;  
storing the process flow diagram in the database.

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84. A system for processing FSO transactions, the system comprising:  
a computer program;  
a computer system;  
wherein the computer program is executable on the computer system to  
execute the method of:

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listing one or more processing steps on a display screen in data  
communication with the FSO computer system comprising a database;  
selecting a first step from the listed one or more processing steps;  
preparing a process flow diagram comprising the selected first step,  
wherein the process flow diagram is displayed on the display screen, wherein the  
process workflow diagram describes a process workflow sequence;  
storing the process flow diagram in the database.

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85. The system of claim 84, wherein the computer system comprises a display  
device coupled to the computer system to display data.

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86. The system of claim 85, wherein the display device is a display screen.

87. The system of claim 84, wherein the computer system comprises a user  
input device coupled to the computer system to enter data.

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88. The system of claim 87, wherein the user input device is a mouse or a  
keyboard.

